

Program: Relationship Management

The Information Services and Technology (IS&T) Relationship Management program was created and implemented to help establish strategic partnerships across the Institute and to assist customers in navigating the highly varied service offerings. This program provides the opportunity to have staff dedicated to working directly with clients on their overall IT needs. A key component of the program focuses on intra-IS&T communications to ensure bi-lateral communication across central IT as well as with the client. Relationship management also serves to augment existing relationships, but does not make decisions for the operational and service teams.

Relationship Management:

- Advises customers of available IS&T services and other options
- Brings the key IS&T individuals and customers to the table to explore options and identify solutions
- Identifies opportunities for future IS&T services
- Provides comprehensive management of the IS&T/client relationship by coordinating cross-functional IS&T activities for customer
- Learns about customers' IT initiatives to help influence their direction
- Is a resource for customers who don't know the appropriate contact for IS&T services
- Defers decision-making to the appropriate operational and service teams

1. Accomplishments for Q2 2007

- a. Presented RM Metrics to the IS&T leadership team
- b. Scheduled quarterly meetings with VP staff to discuss RM clients and review new service opportunities
- c. Established one on one meetings with IS&T Directors beginning in December 2006 to share RM successes and client information and to solicit feedback on the program
- d. Successfully oriented a new Relationship Manager (Margaret Wong) in December 2006
- e. Began outreach to the School of Science, the Office of Budget Operations, and DUE.
- f. Continued liaison work on the following construction projects: Sloan School, PDSI, NW35, the Cancer Research Center, and the new Media Lab
- g. Established Client – IS&T connections (examples)
 - i. Met with the following SHASS administrative officers: History, Music/Theatre Arts, Women's Studies, Consortium for Graduate Women's Studies, Writing, Science Technology and Society, and Center for International Studies.
Completed high level matrix of SHASS usage of IS&T services, with available information.
 - ii. Department of Urban Studies for website redesign
 - iii. Media Lab for IS&T services within E14
 - iv. Chemistry for ongoing desktop support
 - v. Chemical Engineering leveraging IS&T survey expertise

- vi. DSL representation on the Student Systems Steering Committee
 - vii. DSL working with OIS to discuss residential network upgrades.
 - viii. CAO, Audit, Facilities and DITR
 - h. Specific collaboration efforts with IS&T
 - i. Worked with CSS to define an IS&T Help Desk Consulting Summary report for RM clients
 - ii. Began working with Telephony to scope a project for a strategic approach to cellular phone coverage.
 - i. Specific collaboration efforts outside of IS&T
 - i. Promoted awareness of IS&T services around the Eudora retirement
 - j. Finalized a model to assess and measure the stages of the IS&T relationships with existing clients
 - k. Established a Relationship/Account Management Community of Practice to enable continued collaboration among universities and industry programs. Participants include Bose, Stanford, Cornell, and MIT.
 - j. Continued liaison work with existing clients
2. Goals for Q3 2007
- a. Conduct focus group(s) to evaluate the maintenance and dissemination of client profile information
 - b. Expand the Relationship Management website to provide critical client information and relevant metrics
 - c. Gather data regarding DLC IT expenditures to assist in client prioritization
 - d. Promote awareness of IS&T services around the rollout of Vista and Office 2007
 - e. Continue evolving the Relationship/Account Management Community of Practice to enable ongoing collaboration among universities and industry programs
3. Goals for the Remainder of FY 2007
- a. Continue to manage established DLC relationships
 - b. Continue to work with clients and IS&T on existing and newly identified construction projects
 - c. Assess existing client portfolios and outstanding client universe to determine opportunities for additional engagements by March 2007
 - i. Identify and establish new relationships with the Executive VP's Office (CAO, Procurement, etc.)
 - d. Continue to facilitate strategic conversations between IS&T and DLCs as needed
 - e. Promote early awareness of new IS&T services and projects to DLCs
 - f. Continue integration of RM function within IS&T by holding focus groups on maintenance and dissemination of client profile information
 - g. Continue supporting development of relevant IS&T resource materials as collateral
 - h. Continue evolving metrics to measure the success of the RM program